

# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:  
RECEIVED  
SECRETARY OF THE SENATE  
PUBLIC RECORDS

2019 OCT -9 PM 1:19

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), AND  
☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Pew Charitable Trusts

Travel date(s): September 13-15, 2019

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$60	\$268	\$132	n/a
<input checked="" type="checkbox"/> Actual Amount				

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): see itinerary attached

10/9/19  
(Date)

Erin Vaughn  
(Printed name of traveler)

[Signature]  
(Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/9/19  
(Date)

[Signature]  
(Signature of Supervising Senator/Officer)

00  
01  
02  
03  
04  
05  
06  
07  
08  
09  
10  
11  
12  
13

Private Sponsor Certification - Page 1 of 4

**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**





21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the federal per diem rate for Annapolis, MD.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Roundtrip transportation to Annapolis will be provided via coach charter buses.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Tamera Luzzatto

Name and Title: Tamera Luzzatto

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: (202) 552-2000

Fax Number: (202) 552-2299

E-mail Address: tluzzatto@pewtrusts.org

11/15/2011 10:00 AM

04  
MM  
CO  
LO  
CO  
CO  
CO  
CO  
CO  
CO  
CO  
CO

14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the seventh Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.

15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.



## **Bipartisan Senate Chiefs of Staff Conference** **Annapolis, Maryland | September 13-15, 2019**



# Conference Schedule

### Friday, September 13, 2019

- 2:30pm Depart Dirksen via buses
- 3:30-4:30pm **Maryland State House – Greeting by Senator Ben Cardin**  
The oldest American state house in continuous legislative use, dating to 1779, and the U.S. Capitol from November 26, 1783, to August 19, 1784. Senator Cardin will welcome chiefs to his state capital and speak about his legislative experiences working across the aisle.
- 4:30pm Walk to the Historic Inns of Annapolis.  
Luggage retrieval and hotel check-in.
- 6:00-8:00pm **Dinner – Governor’s Mansion with visit by Governor and Mrs. Hogan.**  
Governor Lawrence J. Hogan, Jr. was sworn in as the 62nd governor of the State of Maryland on January 21, 2015. In 2018, he was re-elected to a second four-year term. Maryland’s first lady is Yumi Hogan, a first-generation Korean-American, artist and teacher. Governor Hogan will address his challenges and successes leading a politically-divided state government.

### Saturday, September 14, 2019

- 8:30-9:30am Breakfast at your leisure, Calvert House, Historic Inns
- 9:30-11:00am **Amy Mitchell, Pew Research Center**  
*Americans’ Views of Their Local News.*  
With an informed citizenry being essential to an effective democracy, where Americans get their news and their trust in those sources is critical. While much attention is paid to national cable news, a significant number of Americans still rely on local sources for news and information. Amy Mitchell will discuss Pew’s recent survey of 34,897 adults on their views of local news and the implications for policymakers.
- 11:00am-11:30am Break

- 11:30am-1:00pm **Lunch**  
**Captain Thomas Buchanan, 88<sup>th</sup> Commandant of Midshipmen, United States Naval Academy**  
 Commandant Buchanan will provide chiefs with an overview of the Academy's mission and walk through the four-year cycle of a Midshipman. Because Senators are given the opportunity to make nominations, he will also provide insights into the qualities sought by the Academy in the admissions process.
- 1:15-2:45pm **Professor Joanne Freeman (Yale University)**  
*The Field of Blood: Violence in Congress and the Road to Civil War.*  
 Professor Freeman recovers the long-lost story of physical violence on the floor of the U.S. Congress. Drawing on an extraordinary range of sources, she shows that the Capitol was rife with conflict in the decades before the Civil War. Professor Freeman will bring historical context and insight to today's partisan and factional challenges in Congress.
- 2:45-3:00pm Break
- 3:00-4:30pm **David Pogue (The New York Times and CBS Sunday Morning)**  
*A.I., Robotics, and America in 2050.*  
 From 2000 to 2013, David Pogue was the New York Times weekly tech columnist. After a five-year detour to Yahoo Finance, he's now he's back at the Times, writing the "Crowdwise" feature for the "Smarter Living" section. He's a four-time Emmy winner for his stories on "CBS Sunday Morning," and a host of 17 science specials on "NOVA" on PBS. David will talk about the latest advances in artificial intelligence and robotics and the implications for policy makers, the U.S. economy, government, and society as a whole.
- 6:30-8:00pm **Dinner**  
**Keynote Speaker – Derrick Wang, composer, "Scalia/Ginsburg"**  
*(U.S. Naval Academy Officers Club)*  
 Derrick Wang serves on the faculty of the Peabody Conservatory of The Johns Hopkins University, where he designs and teaches interdisciplinary courses on music and law and lectures on the power of the arts to transcend political divides. Derrick will speak about the unexpected and unique bipartisan relationship between Supreme Court Justices Antonin Scalia and Ruth Bader Ginsburg centered around their shared appreciation for opera and lessons which can be learned and applied to the legislative branch. He will also share a few selections from his opera, "Scalia/Ginsburg" which was written using the actual words and opinions of the two justices.



LA  
MI  
CO  
LO  
CO  
CO  
CO  
CO  
CO  
CO  
CO  
CO  
CO

8:00-9:30am Breakfast at your leisure, Calvert House, Historic Inns - Bag Call

9:30-11:30am

**Ira Chaleff**  
*The Courageous Chief of Staff: The Art of Providing Guidance and Feedback to the Senator*

Ira Chaleff, Chairman Emeritus of The Congressional Management Foundation, and author of the award-winning book “The Courageous Follower: Standing Up To and For Our Leaders”, will do a reprise of the well-received talk he gave at the 2009 Chiefs of Staff conference. While each Senator is unique, as is the relationship with the Chief, there are certain commonalities that occur in the exercise of power. These require close advisors to use courage and skill to minimize blind spots and maximize success. Ira will examine these with the chiefs and offer approaches to add to the existing tool kits the chiefs have developed.

12:00pm

Pick up box lunches

12:15pm                      Buses depart

1:30pm Arrive Capitol Hill

**2019 Bipartisan Senate Chiefs of Staff Conference**  
**September 13-15, 2019**  
**List of Invited Staff**

First Name	Last Name	Senate Office
Steve	Abbott	Sen. Susan M. Collins
Michelle	Altman	Sen. James P. Lankford
Michelle	Barlow Richardson	Sen. Roger F. Wicker
Allyson	Bell	Sen. Mike Lee
Reynaldo	Benitez	Sen. Catherine M. Cortez Masto
Sarah	Benzing	Sen. Sherrod C. Brown
Cassie	Bladow	Sen. John H. Hoeven III
Tony	Blando	Sen. Ron H. Johnson
Daniel	Brandt	Sen. Pat J. Toomey
Joe	Britton	Sen. Martin T. Heinrich
Brennen	Britton	Sen. Jerry Moran
Joel	Brubaker	Sen. Shelley Moore Capito
Jami	Burgess	Sen. Maria Cantwell
Larry	Burton	Sen. Dan S. Sullivan
Neil	Campbell	Sen. Jack F. Reed
Joi	Chaney	Sen. Kirsten E. Gillibrand
Steve	Chartan	Sen. Ted Cruz
David	Cleary	Sen. Lamar Alexander
Dara	Cohen	Sen. Jacklyn S. Rosen
Caryn	Compton	Sen. Bernie Sanders
John	Connell	Sen. Todd C. Young
Kathleen	Connery Dawe	Sen. Angus S. King Jr.
Jackie	Cottrell	Sen. Pat Roberts
Doug	Coutts	Sen. Tom Cotton
Aaron	Cummings	Sen. Chuck Grassley
Dayne	Cutrell	Sen. Richard C. Shelby
Jonathan	Davidson	Sen. Michael F. Bennet
Jennifer	DeCasper	Sen. Tim E. Scott
J.P.	Dowd	Sen. Patrick J. Leahy
Eric	Einhorn	Sen. Brian E. Schatz
Kaitlin	Fahey	Sen. Tammy Duckworth
Eric	Feldman	Sen. Gary C. Peters
Charles	Flint	Sen. Marsha Blackburn
Kristen	Gentile	Sen. Bob Casey
Lisa	Goeas	Sen. Joni K. Ernst
Marc	Goldberg	Sen. Maggie Hassan
Samuel	Goodstein	Sen. Sheldon Whitehouse
David	Grannis	Sen. Dianne Feinstein
Dana	Gresham	Sen. Doug Jones
Mark	Gruman	Sen. Kevin J. Cramer

PA  
NN  
CO  
LO  
CO  
CO  
CO  
CO  
CO  
CO  
CO  
CO

First Name	Last Name	Senate Office
Joe	Hack	Sen. Deb Fischer
Coti	Haia	Sen. Mazie Hirono
Mike	Harney	Sen. Mark R. Warner
Patrick	Hayes	Sen. Joe Manchin III
William	Henderson	Sen. Rand Paul
Mike	Henry	Sen. Tim M. Kaine
Allison	Herwitt	Sen. Chris S. Murphy
Natasha	Hickman	Sen. Richard M. Burr
Toni-Marie	Higgins	Sen. John N. Boozman
Luke	Holland	Sen. James M. Inhofe
John	Insinger	Sen. James E. Risch
Mark	Isakowitz	Sen. Rob J. Portman
Beth	Jafari	Sen. John Cornyn III
Mark	Johnston	Sen. Mike Rounds
Meg	Joseph	Sen. Kyrsten Sinema
Joshua	Kelley	Sen. Mike Braun
Joel	Kelsey	Sen. Richard Blumenthal
Joan	Kirchner Carr	Sen. Johnny Isakson
Coy	Knobel	Sen. Mike B. Enzi
Rohini	Kosoglu	Sen. Kamala D. Harris
Chad	Kreikemeier	Sen. Jeanne Shaheen
Dan	Kunsman	Sen. John A. Barrasso
Dylan	Laslovich	Sen. Jon Tester
Ted	Lehman	Sen. Thom R. Tillis
Mindi	Linguist	Sen. Patty Murray
Jeff	Lomonaco	Sen. Tina Smith
Christopher	Lynch	Sen. Ben L. Cardin
Michael	Lynch	Sen. Charles E. Schumer
Becky	Marr	Sen. John Thune
Philip	Maxson	Sen. Mitch McConnell
Stacy	McBride	Sen. Roy D. Blunt
Jeffrey	Michels	Sen. Ron Wyden
Anne	Morris Reid	Sen. Elizabeth A. Warren
Bill	Murat	Sen. Tammy Baldwin
Mike	Needham	Sen. Marco Rubio
Ryan	Nelson	Sen. John Thune
Bianca	Ortiz-Wertheim	Sen. Tom S. Udall
Marli	Pasternak	Sen. Ben Cardin
Mike	Pawlowski	Sen. Lisa A. Murkowski
Elizabeth	Peluso	Sen. Amy Klobuchar

**2019 Bipartisan Senate Chiefs of Staff Conference**  
**September 13-15, 2019**  
**List of Invited Staff**

First Name	Last Name	Senate Office
Richard	Perry	Sen. Lindsey Graham
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Sydney	Reed	Sen. Pat Roberts
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred	Turner	Sen. Bob Menendez
Matt	Van Kuiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley





JOHNNY ISAKSON, GEORGIA, CHAIRMAN  
BARBARA BOXER, CALIFORNIA, VICE CHAIRMAN

PAT ROBERTS, KANSAS  
JAMES E. RISCH, IDAHO

CHRISTOPHER COONS, DELAWARE  
BRIAN SCHATZ, HAWAII

DEBORAH S. MAYER, CHIEF COUNSEL AND STAFF DIRECTOR  
ANNETTE GILLIS, DEPUTY STAFF DIRECTOR

TELEPHONE : (202) 224-2881  
FACSIMILE : (202) 224-7416  
TDD : (202) 226-3752

# United States Senate

SELECT COMMITTEE ON ETHICS  
HART SENATE OFFICE BUILDING, ROOM 220  
SECOND AND CONSTITUTION AVENUE, NE  
WASHINGTON, DC 20510-6425

## Employee Privately-Sponsored Travel Checklist

Employees must submit their completed Pre-Travel Authorization Package to the Select Committee on Ethics (the Committee) at least 30 days prior to the travel departure date. Incomplete Pre-Travel Authorization Packages and Packages submitted later than 30 days prior to the travel departure date will not be considered or approved. All of the forms and materials listed below are available as fillable PDFs on the Committee's website at <http://www.ethics.senate.gov>.

### Pre-Travel Authorization

#### Prior to Submitting a Pre-Travel Authorization Package to the Committee

- ☐ Review Senate Rules and the Committee's Privately-Sponsored Travel Guidelines on the Committee's website.
  - ☐ Ensure your supervising Senator or Officer (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain) has determined the expenses for the trip are necessary and reasonable.
  - ☐ Ensure your supervising Senator or Officer has certified the proposed travel is connected to your official duties and will not create any appearance of a public office being used for private gain.

#### At Least 30 Days Prior to Travel: Submit Completed Pre-Travel Authorization Package

*File with the Select Committee on Ethics in SH-220*

- ☐ Complete Employee Pre-Travel Authorization Form (Form RE-1)
  - ☐ Ensure this form is typed and that all of the fields are completed.
  - ☐ Ensure your supervising Senator or Officer has signed this form.
  - ☐ Personally sign this form.
- ☐ Ensure Pre-Travel Authorization Package is complete. A complete Package includes:
  - ☐ Form RE-1
  - ☐ Private sponsor invitation (the formal invitation, letter or e-mail you received from the private sponsor).
  - ☐ Completed and signed Private Sponsor Travel Certification Form (4 page form that includes detailed information about the trip).
  - ☐ All attachments to the Private Sponsor Travel Certification Form
    - ☐ Complete and final itinerary
    - ☐ List of Senate invitees
    - ☐ Any other necessary attachments
- ☐ Retain a copy of your complete Pre-Travel Authorization Package for inclusion in your required post-travel disclosure.

0  
1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
32  
33  
34  
35  
36  
37  
38  
39  
40  
41  
42  
43  
44  
45  
46  
47  
48  
49  
50  
51  
52  
53  
54  
55  
56  
57  
58  
59  
60  
61  
62  
63  
64  
65  
66  
67  
68  
69  
70  
71  
72  
73  
74  
75  
76  
77  
78  
79  
80  
81  
82  
83  
84  
85  
86  
87  
88  
89  
90  
91  
92  
93  
94  
95  
96  
97  
98  
99

১৭  
 ১৮  
 ১৯  
 ২০  
 ২১  
 ২২  
 ২৩  
 ২৪  
 ২৫  
 ২৬  
 ২৭  
 ২৮  
 ২৯  
 ৩০

- ### **Post-Travel Disclosure**

*File with the Office of Public Records in SH-232*

- Fax:** (202)-224-7416

Date/Time Stamp:

## EMPLOYEE PRE-TRAVEL AUTHORIZATION

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Erin Vaughn

Name of Traveler: \_\_\_\_\_

Senator Schumer

Employing Office/Committee: \_\_\_\_\_

The Pew Charitable Trusts

Private Sponsor(s) (list all): \_\_\_\_\_

September 13-15, 2019

Travel date(s): \_\_\_\_\_

*Note: If you plan to extend the trip for any reason you must notify the Committee.*

Destination(s): Annapolis, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip will provide professional development and leadership training, which are relevant to traveler's chief of staff duties and will help traveler improve job performance.

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

8/6/19  
(Date)

ERIN VAUGHN  
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, SEN SCHUMER  
(Print Senator's/Officer's Name)

hereby authorize

ERIN VAUGHN  
(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

8/6/19  
(Date)

Chuck Schumer  
(Signature of Supervising Senator/Officer)



## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2. Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
3. Dates of travel: September 13-15, 2019
4. Place of travel: Annapolis, MD
5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
6. I *certify* that the trip fits one of the following categories:  
☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  

**OR**

  
☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  

**AND**

  
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  

**AND**

  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**

**I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:**

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.

**OR**

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).

**—ORF—**

- ☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**

**If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:**

---

---

---

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

**The Pew Charitable Trusts is the sole organizer and sponsor of this trip.**

[illegible]

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:  
See attachment.

---

---

---

---

---

---

- 14. Briefly describe each sponsor's prior history of sponsoring congressional trips:**

**See attachment.**

---

---

---

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate  <input type="checkbox"/> Actual Amounts	\$60/roundtrip	\$268	\$115.50	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Annapolis was selected due to its close proximity to Washington, DC and its historical significance.

19. Name and location of hotel or other lodging facility:

The Historic Inns of Annapolis, 58 State Cir, Annapolis, MD 21401.

20. Reason(s) for selecting hotel or other lodging facility:

The Historic Inns can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the federal per diem rate for Annapolis, MD.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation to Annapolis will be provided via coach charter buses.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Tamer Izzetto

**Name and Title:** Tamera Luzzatto

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: (202) 552-2000

Fax Number: (202) 552-2299

E-mail Address: [tluzzatto@pewtrusts.org](mailto:tluzzatto@pewtrusts.org)



Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts  
Management and Leadership Conference, September 13-15, 2019  
Annapolis, MD

- 1-10. See form.
11. See attachment.
12. See form.
13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the seventh Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
16. See form.
17. See form.
18. See form.
19. See form.
20. See form.
21. See form.
22. See form.
23. See form.
24. See form.
25. See form.











### List of Invited Staff

1500

**2019 Bipartisan Senate Chiefs of Staff Conference**  
**September 13-15, 2019**  
**List of Invited Staff**

First Name	Last Name	Senate Office
Joe	Hack	Sen. Deb Fischer
Coti	Haia	Sen. Mazie Hirono
Mike	Harney	Sen. Mark R. Warner
Patrick	Hayes	Sen. Joe Manchin III
William	Henderson	Sen. Rand Paul
Mike	Henry	Sen. Tim M. Kaine
Allison	Herwitt	Sen. Chris S. Murphy
Natasha	Hickman	Sen. Richard M. Burr
Toni-Marie	Higgins	Sen. John N. Boozman
Luke	Holland	Sen. James M. Inhofe
John	Insinger	Sen. James E. Risch
Mark	Isakowitz	Sen. Rob J. Portman
Beth	Jafari	Sen. John Cornyn III
Mark	Johnston	Sen. Mike Rounds
Meg	Joseph	Sen. Kyrsten Sinema
Joshua	Kelley	Sen. Mike Braun
Joel	Kelsey	Sen. Richard Blumenthal
Joan	Kirchner Carr	Sen. Johnny Isakson
Coy	Knobel	Sen. Mike B. Enzi
Rohini	Kosoglu	Sen. Kamala D. Harris
Chad	Kreikemeier	Sen. Jeanne Shaheen
Dan	Kunsman	Sen. John A. Barrasso
Dylan	Laslovich	Sen. Jon Tester
Ted	Lehman	Sen. Thom R. Tillis
Mindi	Linguist	Sen. Patty Murray
Jeff	Lomonaco	Sen. Tina Smith
Christopher	Lynch	Sen. Ben L. Cardin
Michael	Lynch	Sen. Charles E. Schumer
Becky	Marr	Sen. John Thune
Philip	Maxson	Sen. Mitch McConnell
Stacy	McBride	Sen. Roy D. Blunt
Jeffrey	Michels	Sen. Ron Wyden
Anne	Morris Reid	Sen. Elizabeth A. Warren
Bill	Murat	Sen. Tammy Baldwin
Mike	Needham	Sen. Marco Rubio
Ryan	Nelson	Sen. John Thune
Blanca	Ortiz-Wertheim	Sen. Tom S. Udall
Mike	Pawlowski	Sen. Lisa A. Murkowski
Elizabeth	Peluso	Sen. Amy Klobuchar
Richard	Perry	Sen. Lindsey Graham

20190913-15

**2019 Bipartisan Senate Chiefs of Staff Conference**  
**September 13-15, 2019**  
**List of Invited Staff**

First Name	Last Name	Senate Office
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred	Turner	Sen. Bob Menendez
Matt	Van Kuiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley



## Bipartisan Senate Chiefs of Staff Conference

Invites You and Your Spouse/Significant Other  
To the 7th Biennial

Annapolis, Maryland  
September 13-15, 2019